



Project Recommendations

Project Guide

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1 Information

This guide has been created to provide recommendations and examples on key topics in and around your imc Learning Suite rollout project, based on years of experience with many different customers and scenarios. It also defines the responsibilities during the project to enable you, the customer, to plan accordingly and facilitate an efficient project.

1.1 The Project Team

It is important to define the people responsible for the relevant tasks in the project team and to ensure that sufficient time is available for their tasks (see "Time and resource management").

The composition of the team depends on the individual project requirements, but the following roles have proven successful in most projects (individuals can take on more than one project role if required):

- **Project Manager:** Important for coordinating the presence of your own project team and managing communication with the imc Business Consultant.
- **Technical/IT Specialist:** Responsible for collaborating on topics such as custom URLs, mailing, provisioning user data, SSO, data migration, etc.
- **Content Administrator:** Usually, a person or team responsible for managing (and creating) content in the LMS.
- **System Administrator:** Responsible for other administrative tasks in the entire system (users, bookings, etc.)
- **Data Protection Officer:** Responsible for drafting a privacy policy/terms of use (see "Data protection")

1.2 Time and Resource Management

Proper time and resource management is essential for a successful project, which is why an appropriate project plan is a basic requirement for every project.

imc endeavours to provide resources in on time so that the project can be completed within the planned time, which should also be the case on the customer side.

The more precisely you can communicate your requirements from the outset, the more time you have with your consultant to ask important questions, clarify issues, and use the time efficiently during meetings.

The project stands and falls with cooperation. We need your co-operation to be successful!

- Make sure you are aware of the time commitment required of you and factor it into your work/time schedule during the project.

Define clear tasks in your team, especially when the project becomes more detailed, and you start to refine your scenarios (and at the latest in the test phase).

- We recommend blocking time slots to ensure that you can evaluate the system and your specific use cases sufficiently to enable a punctual Go-Live.

1.3 Rollout Strategy

To plan your project properly, you need to think about how the LMS is going to be introduced to users - your rollout strategy.

- **Big Bang Rollout**
Everyone starts using the system at the same time.
This means that the date and all information about registration, use of the system, etc., must be communicated to all users in advance.
 - How should the information be communicated? (e-mail, newsletter, announcement on the website)
 - It is especially important to allow sufficient buffer time and to evaluate the system thoroughly to ensure a punctual rollout.
- **Silent Rollout**
Theoretically, everyone has access to the system, but there is no big announcement.
 - Thorough testing and good time management are also important here, but a small delay is usually not as dramatic as with the big bang rollout.
- **Pilot Phase**
You start with a small group of selected users and use the feedback to improve your system. This is not a stand-alone rollout strategy and is usually conducted before a "Big Bang" or "Silent Rollout" to enable a better user experience.

1.4 Populating the System with Data

Clearly defining your strategy for populating the system with data is one of the most important topics, as it plays a vital role in determining the involvement of the relevant parties and constraints on the project schedule. Depending on what you have worked with before, you will need to ask yourself different questions or take certain things into account.

Below are three scenarios that we have frequently experienced with our customers and tips on what to consider in these cases.

Scenario 1 - No previous LMS or other course dates

- This is the simplest case. As there is no old LMS or other previous course data, there is no need for any data migration.
- This also means that the courses/content will be created by you, the customer, during/after the test phase in accordance with your usage scenario.

Scenario 2 - No previous LMS, but other course dates

- We often see this with customers who already offer/use courses but do not yet use a complete LMS.
Often the course bookings and participants are recorded in other ways (e.g. with MS Excel). In this case, it is important to first ask yourself whether this data is needed in your LMS or not.

- **No**
 - See scenario 1
 - **Yes***
 - Why do you need the data?
(This will determine what exactly needs to be enabled in the system)
 - ***Example:**
Old data for reports/overview of completed courses (especially for compulsory courses)
- **Learning History Import (LHI)**
 - This is an additional service that is recommended for substantial amounts of data (approx. 100 courses) but can also be used for smaller amounts if the resources for manual creation are very limited.
 - You, the customer, must provide the data in a defined format with exact specifications and are responsible for the quality of this data.
- **It is important to note that the import only contains the names of the courses etc., but no content.**
- If the number of courses and participants is small, it may make more sense to create the courses manually.

Scenario 3 - Migration from another LMS

When migrating from another LMS to the imc Learning Suite, the same questions usually arise as in scenario 2, but usually on a much larger scale. This makes it all the more important to have a clear picture of what you want to take with you from the old system.

- **Course data**
 - LHI (see "Scenario 2")
(It is particularly important to know how to export this data from your old system, how to get it into the format required for the LHI and who in your team is responsible for this)
- **Certain structures of courses/content**
 - Communicate this at an early stage so that your imc Business Consultant can advise you on how these can be implemented in the LMS or what alternatives are possible.

1.5 Data Protection

As the system uses User Data, the issue of data protection is important. It is your responsibility to provide a suitable privacy policy. The imc Business Consultant will provide you with all the information on the required formats and support you in setting up display options for your privacy policy/GTCs. Experience has shown that this process can take time and should therefore be addressed at an early stage.

1.6 The Learning Content Strategy

Why is a learning content strategy so important? It saves time, effort, resources and improves productivity. You can determine what type of content is needed, when it should be delivered, and what should be included to achieve your goals. With a content strategy, you can align your content with organisational goals, cultivate a culture of continuous learning and tailor content to

the needs of individual learners. In addition, a learning content strategy helps you establish a consistent process that can be measured and improved over time. The six steps outlined below should give you ideas for your existing strategy or help you develop a new one. If you have not yet thought about a learning content strategy or need more support, you can ask your sales manager about our Learning Strategy Consulting Service.

1. **Set clear learning objectives**

Before you start creating content, it is essential that you define the learning objectives for your programme. By clearly defining your learning objectives, you can structure your content to support these goals. This is an essential step in developing and delivering an effective learning and development programme that supports business objectives and drives employee performance.

2. **Organise the content into courses**

Once you have defined your learning objectives, you can start organising your content into courses. Courses are usually structured around a specific topic or skill and may include

a combination of text, presentations, videos, tests, and interactive exercises. Breaking your content into smaller, manageable chunks will make it easier for learners to access and navigate the material, leading to better engagement.

3. **Create a hierarchy of learning content**

A hierarchy of learning content helps learners understand how different content relates to each other. A clear hierarchy can also make it easier for learners to navigate the LMS and help managers to control quality. You can create a hierarchy by organising courses into categories or topics and then grouping related categories or topics together.

4. **Use standardised naming conventions**

With a large number of courses, paths, and files in an LMS, it can quickly become difficult for learners and administrators to find the content they need. Standardised naming conventions can make it easier for learners to find the content they need. Use clear and meaningful names for modules and categories and consider using a standard format or template for naming content.

5. **Incorporate feedback**

Include feedback from your target group when developing the structure of your learning content. Ask for feedback on the organisation of your content and whether it supports the learning objectives. You can use this feedback to refine your content structure and make it more effective for learners.

6. **Regularly review and update**

As your programme evolves, it is important that you regularly review and update your content structure. You may need to add new courses or categories and revise existing content to reflect changes to your learning objectives or industry trends.

1.7 Available Customer Enablement Resources

To facilitate a smooth project, it is important that you as the customer have a basic understanding of the system so that you can work efficiently with the imc project team and create the desired learning environment/scenario. Various resources are available to help you achieve this.

- **Enablement Course** in the Learning Connect portal
- **Provided Documentation**

Existing official documentation on specific topics

- The imc Business Consultant will provide the documentation if required.
- **Options subject to payment**
 - Additional training courses: If you require in-depth training on specific topics.
 - Customised documentation: If there is no official documentation on this topic or you need detailed instructions.
 - Please contact your imc sales manager for a quote.
 - When ordering additional training during the project, consider the time of the project.

It is your responsibility to acquire a basic knowledge that will enable you to make decisions regarding the configuration of the system to realise your scenarios by using the above resources independently.

1.8 Testing

The test phase is an important part of the project and gives you the opportunity to thoroughly evaluate your scenarios within the configured system before go-live and to make (minor) changes. For an effective testing phase, it is particularly important that everyone involved in testing has blocked enough time for this in advance (it is best to plan time slots as soon as the project plan is available).

Note: If user engagement is a crucial factor for you, this phase would also be a suitable time for user acceptance testing (UAT) to get user feedback before the system goes live.

1.9 Go-Live

In our projects, we differentiate between technical go-live and customer go-live.

- **Technical Go-Live:**

The system is completely configured, interfaces are integrated - the system is functionally ready for use and the project completion phase can be initiated.

This does not mean that the Go-Live at the customer's premises has to happen simultaneously or right afterwards.
- **Customer Go-Live:**

Courses and contents are prepared, and the system is available to learners.

The technical go-live marks the end of the implementation project. Your imc Business Consultant will guide you through the project completion process. In a "Support Welcome Call" you will be handed over to the imc Service Desk, who will be your main point of contact from this point onwards. The imc Business Consultant will plan a "Sunset Meeting" with you to reflect on the project and discuss probable future requirements for the system, for which your imc Account Manager will be your contact person.

1.10 Risk Management

imc has a range of measures in place to deal with uncertain events or conditions within a project, as they can have an impact on project objectives such as scope, schedule, cost, and quality. Risk management is an integral part of imc's management methodology. Risks are characterised by a certain degree of "uncertainty" in relation to a desired outcome; it is therefore

important to identify potential risks at the start of a project, analyse their potential impact on project outcomes and closely monitor their impact on project work and project success.

Risk management is the joint responsibility of imc and your own project managers, with support from the team. The components of the approach are:

- **Risk Analysis:**
The identification and analysis of risks is part of a joint kick-off workshop. The risks identified in this way are analysed to assess their probability (threat) and impact (vulnerability), with the latter two aspects together determining the severity of the risk. Based on this information, the risks that are categorised as significant and therefore need to be monitored are identified. These risks are entered in a risk log.
- **Risk Management:**
The available countermeasures are assessed for each selected risk. The countermeasures can fall into distinct categories, e.g., mitigation or reduction, transfer, acceptance, or avoidance. Each countermeasure must be assessed in terms of its feasibility and cost, and the most appropriate countermeasures are selected and entered in the protocol for the relevant risks.
- **Risk Monitoring:**
The risk log is the basis for continuous monitoring of the identified risks throughout the project duration. Weekly reports contain an analysis of the risks and their current or potential impact on the success of the project. In this way, risks are regularly reviewed to determine whether their severity or the applicability of countermeasures has changed and appropriate actions (e.g., the introduction of an alternative countermeasure) are taken if necessary.

When we start a project, your project stakeholders are presented with a list of the most important identified risks, which are reviewed in detail before the project begins. Together with you, imc reviews each risk and the likelihood of it occurring and the severity it would have on the project and/or the business. A tolerance threshold is then set so that if the risk materialises, we have transparently agreed how much tolerance is acceptable.

The table below contains guide values for the probability and severity.

Risk	Probability	Severity	Strategy for risk avoidance or management
Business requirements not fully identified/documented/communicated	M	H	<ul style="list-style-type: none"> • Involvement of the most important stakeholders in the requirements workshop • Involve decision-makers in the workshop. • Carefully planned system design documentation
Company/organisational requirements changed during the project	M	M	<ul style="list-style-type: none"> • A well-documented formal change process has been introduced. • Evaluation of the impact of changes on time, budget, and costs

Lack of availability of resources during the project	M	H	<ul style="list-style-type: none"> Specify the required resources and deadlines as early as possible. Have emergency resources ready (in case of illness, etc.) Monitoring and adjusting holidays to the project plan. Close monitoring of the project plan on an ongoing basis
Dependence on third parties for technical integration	L	M	<ul style="list-style-type: none"> Clear definition of the integration method in advance Switch on third parties as early as possible. Set clear expectations of when and what is required for a third party
Decision on authorisation not made in time	M	M	<ul style="list-style-type: none"> Involve the decision-makers in the discussions at an early stage. Clearly define the responsibilities of the decision-makers and the process in advance. Set clear expectations/responsibilities/deadlines for decisions. Open communication
Inferior quality of data for migration	L	M	<ul style="list-style-type: none"> Check which relevant data is included. Define rules for deciding which data should be imported. Early provision of a sample data set for tests Detailed validation and verification of the data
The deadlines in the project plan are not met	M	H	<ul style="list-style-type: none"> Realistic initial project planning Make all responsible persons accountable for their performance. Constant monitoring throughout the entire project Early identification and escalation of problems Search for alternative resources
Loss of key project resources in the project	M	H	<ul style="list-style-type: none"> Distribute the project knowledge among multiple people. Creation of documentation protocols to capture all knowledge about the project

Low acceptance of the system after Go-Live	L	H	<ul style="list-style-type: none"> • Involvement of the most important stakeholders at the beginning and throughout the entire term. • Careful communication/launch strategy • Ensure that stakeholders are informed about the reasons for the change, "what's in it for me". • Ensure that the needs and concerns of stakeholders are taken into account during project implementation.
Low level of support from leadership; or support from leadership diminishes over time.	M	H	<ul style="list-style-type: none"> • Communicate effectively with various leadership groups to highlight benefits and clarify questions or concerns. • Involvement of decision-makers in process workshops

Please note that imc only implements full risk management in projects with a high proportion of project management. In a standard project, only an adapted risk management takes place, which is applied in the context of regular status calls and status reports.